

April 21, 2004

Call Modernization Project Help Desks: An Integration of Systems

Presentation Overview

- ❑ Help Desk Overview and Structure
- ❑ Help Desk Team
 - Purpose and overview

Goals and Objectives of CDR Help Desk

- ❑ Enable help desk that:
 - Ensures CDR User satisfaction is as high as possible at all times
 - Interfaces seamlessly with software vendor and FFIEC help desk solutions
- ❑ CDR Help Desk should meet the following SLA's:
 - Average Speed of Answer: average time elapsed from the instant the call enters a queue, until an agent answers the call. Less than 60 seconds
 - Call Abandon Rate: the percentage of callers who terminate a call after the average speed of answer and prior to reaching an available agent. Less than 10% for Call Waiting more than 60 seconds
- ❑ Formal CDR Help Desk ready by June 1 with improvements made through CDR Launch

Help Desk Overview

- ❑ Four Help Desk Layers:
 - CDR Help Desk (Unisys and V-Tech supported)
 - FFIEC Help Desk (FFIEC supported)
 - Software Vendor Help Desk (Vendor supported)
 - Hosting Data Center Help Desk (Eagan supported)
- ❑ Caller routed to appropriate help desk based on problem
 - Goal is seamless sharing of information between help desks
- ❑ Live CDR Help Desk available during primary business hours
 - 7 am EST to 10 pm EST, Monday through Saturday
 - Web-based Help Desk available during other hours

Help Desk Layers

- ❑ CDR Help Desk
 - Address CDR usability and access issues
- ❑ FFIEC Help Desk
 - Address accounting and regulatory reporting issues (e.g., edit questions)
- ❑ Software Vendor Help Desk
 - Address issues relating to Call Report software used at bank site
- ❑ Hosting Data Center Help Desk (Eagan, MN)

- Used to monitor hosting service performance
- Little to no CDR User interaction w/this help desk

Help Desk Call Levels

- CDR Help Desk will operate on three levels of service
 - Level I: answers calls and questions with respect to proper use of the CDR application (e.g., user error)
 - Level II: answers calls and questions with respect to CDR system status and communications issues between remote users and the CDR (e.g., server and connectivity issues)
 - Level III: used if the issue cannot be resolved by giving tested directions to the calling end user; used to uncover latent process or code problems (e.g., bugs in CDR code)

Help Desk Call Flow

Help Desk Call Flow: calls will flow up to three levels

- I. Level I Call
 - a. Caller enters at this level and is routed based on various criteria
 - i. If pre-filing problem, then caller sent to SW Vendor help desk
 1. Once resolved call is closed and logged in CDR help desk log
 - ii. If post-filing or filing problem, caller is routed to the FFIEC or CDR help desk
 1. Script One is performed
 - a. If call resolved, it is closed and logged in CDR help desk log
 - b. If call not resolved, it is escalated to Level II (see Roman Numeral II)
- II. Level II Call
 - a. Script Two performed
 - i. If call resolved, it is closed and logged in CDR help desk log
 - ii. If call not resolved, it is escalated to Level III (see Roman Numeral III)
 - iii. NOTE: Call may be transferred to SW Vendor help desk
- III. Level III Call
 - a. Script Three performed
 - i. Call resolved with a procedure fix, code fix, or no fix required
 1. Call is closed and logged in CDR help desk log
 - ii. Call may be transferred to relevant COTS SW Vendor for a 3-way call

CDR Help Desk Operations

- CDR Help Desk solution will use REMEDY contact management software
 - Functionality includes contact tracking, call center management, knowledge-based applications, and quality monitoring/reporting

- Utilizes such technologies as automated voice response units, automated responders, and web chat
- Utilize self-help web interface
 - CDR FAQ's
 - Scripts and user guides that CDR Users can work through
 - Web form for CDR Users to generate a trouble ticket number during off hours that routes issue appropriately
 - Method for sharing trouble ticket with other CDR related help desks where possible

CDR Help Desk Operations

- Include both technical and functional support
 - Technical support: questions from users on connectivity, access issues, user interfaces, bulk data transfers, or web service interfaces
 - Functional support: questions from users related specifically to the CDR functionality (e.g., questions about the submission process, validation parameters, and gaining access to the financial data)
- Utilize automated phone systems and human interaction during primary business hours to guide callers to the appropriate solution
 - Primary business hours are 7 am EST to 10 pm EST, Monday through Saturday
 - Secondary hours are all other times
 - During secondary hours other forms of automated, self-help support shall be available

CDR Help Desk Reporting

- V-Tech to collect and maintain CDR Help Desk call metrics
 - Measures the performance standards and Service Level Agreements
- Deliver CDR Help Desk reports on a daily, weekly, or monthly basis to the FFIEC that include:
 - Average Speed of Answer
 - Calls Received, Answered, Abandoned, and % Abandoned
 - % First Call Resolution
 - Satisfaction Survey
 - Closed Incidents by Location and Type
 - Incident Handling Performance
 - Open Incidents by Age
 - Open Incident Detail
 - % of Calls from Software Vendor, CDR, and User Error
- Provide benchmarks of call center practices at least twice a year

Help Desk Team (HDT)

- Purpose:
 - Establish communication and collaboration between stakeholders on help desk efforts
 - Research help desk options and questions

Julie Powell (FRB)

HDT Chair

- Roles: 1. Lead HDT
2. Monitor progress of help desk efforts

Gary Irving, Jeff Fleshman (Unisys)

- Roles: 1. Facilitate communication
2. Point of Contact for all parties
3. Monitor progress of help desk efforts

Victor Holt, Craig Basham, Reginald Johnson (V-Tech)

- Roles: 1. Implement CDR Help Desk
2. Operate CDR Help Desk
3. See SOW for complete list of roles

Trippi Penland, Alan Deaton (FDIC)

- Roles: 1. Contribute to script development
2. Share experience helping banks
3. Ensure agency needs meet

Liz Graham (FRB)

- Roles: 1. Contribute to script development
2. Share experience helping banks
3. Ensure agency needs met

Kathie King, Craig Stone (OCC)

- Roles: 1. Contribute to script development
2. Share experience helping banks
3. Ensure agency needs met

Software Vendors (one from each)

- Roles: 1. Share help desk processes & best practices
2. Share experience helping banks

Hosting Center Help Desk (Eagan)

- Roles: 1. Facilitate help desk information sharing
2. Operate hosting center help desk

Help Desk Questions (page 1)

- ☐ Hosting of CDR Help Desk REMEDY Solution – 3 Options
 - Hosting at V-Tech location in Silver Spring, MD
 - Hosting at Eagan data center in Minnesota with V-Tech renting out remote seats
 - Hosting at help desk data center in Michigan with V-Tech renting out remote seats
- ☐ Entry Point of Help Desk Calls – 2 Options
 - All calls through one number with automated routing based on keypad answers to a question tree

- Multiple numbers depending on user's issue

Help Desk Questions (page 2)

- ☐ Enable collaboration of various help desks to integrate seamless transfer of callers
 - Create shared trouble ticket numbers/tracking methods
- ☐ Create help desk scripts to guide help desk personnel through a caller's issue
- ☐ Design off-hours help desk solutions
 - Web-forms to submit an issue
 - FAQ's
 - User Guides

Question or Comments

- ☐ Questions or comments
 - Jeff Fleshman / jeffrey.fleshman@unisys.com / 202-742-6940